



# State of Wisconsin Department of Public Instruction

Elizabeth Burmaster, State Superintendent

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DATE: September 5, 2008

TO: School District Administrators

FROM: David Carlson, Director  
School Financial Services Team

RE: PI 1563 September Pupil Count Report Information  
2007-08 Foster/Group Home Membership Adjustments  
2008-09 PI 1547 Pupil Transportation Report - Summer 2008  
2007-08 PI 1505 Full Financial Annual Report and Unresolved Contracts  
PI 1588 Supplemental Aid with Large Area Report  
Upcoming Mailings and Important Dates

## PI 1563 September Pupil Count Report Information

Please route the following information to the individual(s) who complete the PI 1563 September Pupil Count Report for your district. The pupil count date is Friday, September 19, and the report is due Friday, October 3.

The PI 1563 Internet Pupil Count Report program will open for district data entry on Friday, September 19. Districts can access this report by clicking on the "School Finance Reporting Portal" link and then proceeding to the district's home page. Click on either the "Status and Due Dates" or "Non-Financial Data Home" link to access the report.

Resources are available to assist districts in generating the pupil count data. Pupil count report instructions and a worksheet are available on the team's website at: <http://dpi.wi.gov/sfs/membrpt2.html>. In addition, a webcast entitled "Counting Students for the PI 1563 Pupil Count Report" is on the finance team's home webpage under "Webcast Presentations" or directly at: <http://media2.wi.gov/DPI/Viewer/?peid=e7d81857-5e79-4992-b951-0366fcdf816f>. The team encourages district staff responsible for the PI 1563 report to review these resources as they reflect the steps districts will follow to report students on the report.

If your district is unable to hold school on September 19, a request for an alternative pupil count date must be submitted to the state superintendent (s. 121.05(3), Wis. Stats.). Address your request to Janette Gosdeck, School Financial Services Team, by email at [janette.gosdeck@dpi.wi.gov](mailto:janette.gosdeck@dpi.wi.gov). Please specify the alternative date that you are requesting. In most circumstances, the date should be either the Thursday before or the Monday after the Friday count date.

Districts wishing to amend their pupil count report after the original submission should log on to the Internet reporting program and make the changes. Note: after making the changes, click the "Submit to DPI" button. The department's pupil count database will automatically be updated and an audit trail will be created reflecting the date and time of the submitted changes. Districts are required to print and keep on file a paper copy of the original submission and any amendments.

Districts with students participating in the fall semester Youth Challenge Academy Program will be asked to complete a PI 1563 Youth Challenge Academy Report. Districts can access this report by clicking on the "School Finance Reporting Portal" link and then proceeding to the district's home page. Click on either the "Status and Due Dates" or "Non-Financial Data Home" link to access the report. Districts will not be allowed to submit the PI 1563 September Pupil Count Report until the PI 1563 Youth Challenge Academy Report has been submitted.

#### **PI 1589 Foster/Group Home Membership Adjustments – 2007-2008**

Included in this mailing are printouts for specific districts showing the adjustments in the 2007-2008 membership for group and foster home students authorized by s. 121.05(4), Wis. Stats. Those districts that did not participate or did not experience a membership adjustment due to group or foster home students will not receive a printout in this mailing. This adjustment affects only the general aid membership used to calculate 2008-2009 general aid; it has no effect on the district's revenue limit calculation. Contact Debbie Gaffney Dilley, by telephone at (608) 267-9114 or by email at [debra.gaffney-dilley@dpi.wi.gov](mailto:debra.gaffney-dilley@dpi.wi.gov) with questions.

#### **PI 1547 Pupil Transportation Report - Summer 2008**

The 2008-2009 PI 1547 Pupil Transportation Report will open for summer school 2008 data entry on September 5, 2008. This report is only opened for entry into the "Report Contact" and the "Pupils Transported to Summer School" pages to provide access when 2008 summer school data is more readily available. The report will have to be submitted after it is reopened for regular school year data entry in the summer of 2009.

Districts can access this report by clicking on the "School Finance Reporting Portal" link and then proceeding to the district's home page. Click on either the "Status and Due Dates" or "Non-Financial Data Home" link to access the report. The complete PI 1547 including the data for the regular 2008-2009 school year is due August 1 following the close of your fiscal year; however, districts are encouraged to complete the summer school portion now when the information has been recently collected.

#### **PI 1505 Full Financial Annual Report and Unresolved Contracts**

The district's 2007-2008 Annual Report (PI 1505 AC and PI 1505) may include payroll and related benefit costs only to the extent that they are associated with implemented bargaining agreements or an implemented Qualified Economic Offer (QEO). Implementation must occur by the October 1 following the June 30 fiscal year end (s. 120.18(1) (gm), Wis. Stats.).

If the district and an employee bargaining unit do not have an implemented agreement, the recording of any increased costs above the most recent agreement is limited to the lower of the district's or bargaining unit's final offers submitted under the Wisconsin Employment Relations Commission (WERC) binding arbitration rules. [http://dpi.wisconsin.gov/sfs/doc/unsettled\\_contract.doc](http://dpi.wisconsin.gov/sfs/doc/unsettled_contract.doc). If a change in employee contract status occurs after report filing, but prior to October 1, contact one of the auditors Gene Fornecker (608) 267-7882, Kathy Guralski (608) 266-3862 or Natalie Rew (608) 267-9212, immediately. The department will use the estimated additional settlement cost in determining the district's October 15 certified aid amount.

## PI 1588 Supplemental Aid with Large Area Report

Supplemental Aid for School districts with a Large Area is an annual entitlement program authorized under s. 115.435, Wis. Stats. Applications and further information regarding the eligibility requirements can be found at the following link: <http://dpi.wi.gov/sfs/supaid1.html>.

Application form PI 1588 for this program is due October 15. Contact Brad Adams at the address below should the district have questions.

## Upcoming Mailings and Important Dates

Date	Event
September 5	PI 1505 SE Special Education Report Due
September 15	September General Aid Payment/Sparsity Aid Payment/PI 1506AC and PI 1506 FB Reports due from Auditors
September 19	Third Friday Pupil Count Date/PI 1563 Opens for Data Entry
September 24	Preliminary General Aid Estimate Posted to Internet
October 1	PI 1804/1805 Summer School Report Due PI 1505 Full Financial Annual Report Due PI 1524 State Tuition Claim Due Tentative Mailing of 2008 Tax Apportionment Values/PI 401 Tax Levy Report Instructions/PI 1504 Budget Report Instructions/PI 1505 SE Budget Report Instructions
October 3	PI 1563 Pupil Count Report Due PI 1563 Youth Challenge Academy Report Due
October 14	Tentative Mailing of Certification of 2008-2009 Aid Eligibility; Revenue Limit Calculation to Line 13
October 15	PI 1541 and PI 1542 Integration Program Reports Due
October 16	PI 401 Tax Levy Report Opens For Data Entry
October 31	PI-1161 Indirect Cost Due Date
November 6	Due Date for Levy Reporting to Municipalities
November 10	SAGE Aid Payment
November 14	Due Date for PI 401 – Tax Levy Data
November 17	Special Education Aid Payment
December 1	Audited 2007-2008 Financial Statements Due From Auditors PI 1570 High Cost SPED Report Due General Aid Payment (Equalization and Special Adjustment)
December 5	PI 1504 Budget Report and PI 1505 SE Special Education Budget Report Due

Please contact one of the following School Financial Services Team staff should you have questions:

Brad Adams	<a href="mailto:bradley.adams@dpi.wi.gov">bradley.adams@dpi.wi.gov</a>	(608) 267-3752
Lori Ames	<a href="mailto:lori.ames@dpi.wi.gov">lori.ames@dpi.wi.gov</a>	(608) 266-3464
Karen Kucharz Robbe	<a href="mailto:karen.kucharzrobbe@dpi.wi.gov">karen.kucharzrobbe@dpi.wi.gov</a>	(608) 267-9707

The School Financial Services Team Internet home web page is located at:  
<http://dpi.wi.gov/sfs/index.html>.

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Enclosures: Foster/Group Home Aid Membership Adjustment Memo (Some Districts)  
Foster/Group Home Membership Adjustment Detailed Summary (Some Districts)